

Explanatory notes to support application forms.

Discretionary Rate Relief (charitable)

Under section 47 of the Local Government Finance Act 1988, discretionary rate relief may be awarded provided that one, or more, of the following applies:

- The rate payer is a charity, or trustee for a charity and the hereditament is wholly or mainly used for charitable purposes, or
- All or part of the hereditament is occupied by an institution or organisation not conducted for profit and whose main objectives are philanthropic, religious or concerned with Education, Social Welfare, science literature or the fine arts, or
- The hereditament is used wholly or mainly for purposes of recreation and it is occupied for the purposes of a club, society or other organisation not established or conducted for profit.

Discretionary Relief of up to 100% can be awarded in accordance with Redditch Borough Council criteria.

- Applications must support RBC priorities as set out in the corporate plan:
 - a. Health & Housing
 - b. Community Safety
 - c. Leisure
 - d. Local Environment & Transport
- National Organisations must show a direct benefit to either RBC or the general public.
- The activity must not seek to promote or oppose any political part or be perceived as being contrary to RBC aims and objectives..

Up to 20% discretionary in addition to 80% Mandatory to the following:

- Charity shops must show that they support the local community and that donated goods make up at least 50% of total sales.
- Social Welfare institutions such as CAB, Carers Careline and Victim Support providing that they benefit the Redditch community.
- The Scout and Girl Guide Association.
- Theatres & Museums

Sports and Social Clubs up to maximum of 50%

- a) No top up from 80% mandatory awarded.
- b) The organisation should not be conducted for profit.
- c) Where there are more than 100 members at least 80% should live in the Redditch area.
- d) Membership should not be restricted.
- e) Dependant on the number of similar facilities provided in the authority.

Rural rate relief

In order to qualify for relief your property must fall within one of the rural settlements defined in the Rural Settlement List, which consists of:

Feckenham, to include Ham Green, Berrow Hill, Elcocks Brook and part of Bradley Green

Astwood Bank

You can inspect the list or make further enquiries about entitlement at:

The Town Hall
Alcester street
Redditch
Telephone – 534023.

Rate Relief for businesses in Rural Areas

Certain types of businesses in rural villages, with a population of less than 3000, may qualify for Mandatory Relief of 50%. The businesses that qualify for this relief are defined as follows:

Sole General Stores and Post Offices together with any Food Store, provided that rateable value is less than £7000; **Sole** pubs and petrol stations provided the rateable value is less than £10500.

If awarded, an application for Discretionary relief can be made in respect of the remaining 50% of the charge.

Local Authorities have the discretion to award, any business in a rural area with a rateable value of less than £14000, Discretionary Rate Relief. The Authority has to be satisfied that the business is of value to the community and also has to have regard to the interests of its Council Tax payers. Businesses who meet the criteria will be entitled to a maximum award of 50% of the charge.

Applications

No relief will be considered unless the Council's application form has been completed and all the requested information has been supplied. Organisations are invited to supply any additional information or evidence to support their claim as appropriate.

Granting of discretionary relief can not be backdated to previous financial years unless the application is received prior to the 30 September.

Where discretionary relief is awarded in the current financial year and an organisation changes premises before the 31 March, any new award will depend on the rates chargeable i.e.

Where the rates have increased, any award will remain at the amount previously notified a new application will be required for any additional

charges. This extra award will be subject to budgets available, therefore may not always be given.

Where the rates have reduced, the revised amount will be based on the original percentage awarded.

Appeals

Original decisions will be made by Council Officers under delegated powers. Appeals against this decision can be made as follows:-

Where organisations/charities are able to provide further evidence to support a higher score, the appeal will be considered by a different officer from the original decision maker.

Where still dissatisfied with the decision, the organisation will have the opportunity to further appeal through the Executive Committee.

If an application meets the criteria but the current year's budget has been spent, the Executive Committee will decide whether to make an award.

Reviews

The original decision will remain for a period of two years subject to any relevant changes which the organisation/charity will be under a duty to report.

RBC will advise the charity organisation of the circumstances under which the current award was made in December with one reminder being issued in January. Unless signed confirmation is received by 1st February, no award for the next financial year will be made and a further application will be necessary.

Billing No.....

Application by a charity, club, society or other organisation claiming Mandatory and/or Discretionary Rate Relief under section(s) 43(5) and (6) and 45(5) and (6) or section 47 or Mandatory and/or Discretionary Rural Rate Relief under section 43 (6a,6b) and 47 (3a,3b) of the Local Government Finance Act 1988

1. Name and Address of the charity/Organisation claiming relief

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2. Address of property in respect of which relief is claimed

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3. Description of property

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Section A to be completed by applicants claiming rate relief
Section B to be completed by applicants claiming rural rates relief

Section A

The main aims and objectives of the Charity/Organisation

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4. Is the Charity/Organisation registered with the Charity Commissioners or any registered society within the Friendly Societies Act 1896 to 1974?

YES/NO

If yes, please state the Registration Certificate Number or enclose the Certificate for Inspection and Return

Number

If no, please state the reasons on which there is an exemption/exception from registration or give evidence of charitable status.

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APPLICATION OF CRITERIA

(Please do not write in boxes)

Redditch Borough Council's priorities for 2003 - 2006 as set out in the Corporate Plan are as follows:

- Housing & Health
- Community Safety
- Local Environment & Transport
- Leisure

5. Please state how your organisation supports these priorities.

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6. Please give examples of how the local community has benefited from your activities or facilities.

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Part 1

Please answer the questions relevant to your type of organisation.

Charity Shops

1. Please give examples of how your charity supports the local community.

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2. Please provide evidence (eg Audited Accounts) that the sales income generated from donated goods is greater than 50%.

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Social Welfare Institutions (eg Citizens Advice Bureaux)

3. Please give examples of how your charity supports the local community.

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The Scout & Girl Guide Association

4. Please provide evidence that the Scouts, Guides or other non-profit making local community users are the main users of the premises.

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Theatres & Museums (managed by a charity or trustees of a charity)

5. No further evidence is required. If mandatory relief is awarded a further 20% discretionary relief will be given.

Village of Parish Halls

6. Please provide evidence that non-profit making local community are the main users of these premises.

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CREDIT UNIONS

7. Please provide evidence that your organisation supports social inclusion and debt prevention.

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Part 2

SPORTS AND SOCIAL CLUBS

(Please note organisations that are entitled to Mandatory relief will not be entitled to any further relief and that a maximum 50% discretionary relief will be given to other organisations).

8. Do you have a licensed bar?

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9. What is the percentage of your members that live in the Redditch area?

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10. What is the percentage of members who participate in team activities?

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11. Is membership restricted in any way? (You should provide membership criteria).

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12. Does the organisation provide education, training or coaching facilities in order to develop member skills? Please provide details.

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13. Are membership fees related to the ability to pay? Please provide details.

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14. Are the facilities open to non members and other organisations at reasonable rates? Please give details.

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15. Is the principle of open access to all members of the community in operation? Please give details.

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16. Does the organisation actively encourage membership from particular groups e.g. young people, senior citizens, disabled persons or ethnic minorities? Please provide details.

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17. Does the organisation undertake fundraising activities to finance its own expenses? Please provide details.

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18. Do the facilities indirectly relieve Redditch Borough Council's need to provide, enhance or supplement the service or activity?

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Each of the criteria carries a maximum of 10 points. An application receiving a certain level of points will qualify for a fixed percentage of rate relief as follows:

(If there is a licensed bar 10 points will be deducted from the overall total points)

More than 60 points	50% rate relief
Between 40 & 60 points	35% " "
Between 20 & 40 points	20% " "
Less than 20 points	NIL

SECTION B

RURAL RATE RELIEF

1. Please state the type of business for example Sole general store, Post Office, Pub, Petrol filling station, food shop. Please State.

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2. Is your property to the best of your knowledge, the only business of its type in the rural settlement?

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3. If a general store please give examples of the following

- Goods sold.....
- % of sale of food.....
- % of sale of household goods.....
- % of sale of confectionary.....

To be completed by applicants wishing to apply for discretionary rural rate relief in addition to mandatory relief, or discretionary relief for businesses with rateable values of less than £14000

A maximum of 50% of the total charge can be awarded.

4. Please give full details of the use of the property and describe the nature of the business.

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5. Please give the location of the nearest alternative business to your own ie if your business did not exist how far would local residents have to travel for this service?

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6. In your opinion what significance does your business have on the local community? In particular what would be the impact on the very young, elderly or disabled if the business was not there?

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7. Is your service predominantly used by the local community?

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8. Does your business provide employment for local residents? If so how many?

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9. Please give further details of how your business is of benefit to the local community.

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Any award of Discretionary rural rate relief is dependant on the support of your local councillors. Please ask

To sign below

Signature.....Date.....

Signature.....Date.....

Please note the following documents should be provided with your application:-

- A copy of the Memorandum and Articles of Association or Rules of the organisation.
- Copies of the audited accounts and balance sheets for the last two years.
- Any evidence requested or which supports the answers you have given.
- Please ensure you have your **Ward Councillors** signature if applying for discretionary rural rate relief.

(These will not be returned unless requested).

“I certify that the above particulars are correct to the best of my knowledge and belief.”

Signed..... Name.....

Capacity in which signed:
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Date:..... Tel. No.....

For official use only (Discretionary Rate Relief) (Discretionary Rural Rate Relief)

Points scored..... Relief awarded £.....	Relief awarded.....
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